Effective Onboarding
How It Can Lead to Increased Engagement and Decreased Turnover

Amber Harrer, Manager of Learning & Development
January 25, 2018
My First Job…
Onboarding: What it’s not!
By The Numbers

70% of new hires make the decision to stay or leave an organization within the first 6 months (HCI, 2012)

Formal onboarding increases the change of keeping a new employee for at least 3 years by 69% (Aberdeen Group, 2013)

25% of all turnover occurs in the first 45 days (People Fluent Research, 2012)
Onboarding: What is it?

“Onboarding is the process or system that organizations use to introduce, train, integrate and/or coach new hires to the culture and methods of the company during their first year.”

~Lynn Schleeter, Director of the Center for Sales Innovation
The College of St. Catherine in Minneapolis, Minnesota
Effective Onboarding

Is meant to:
• Introduce and ingrain company culture and way of working
• Reaffirm decision to join organization
• Incentivize new hires to do their best work
• Reinforce what new hire was told in recruiting phase
• Develop, coach, and mentor new hires
• Turn a great hire into a great employee
Impact of EFFECTIVE Onboarding

- **Organizations with best-in-class onboarding:**
  - 91% of first-year employees were retained
  - 62% met first performance milestones on time
  - Better Onboarding = Better Performance

- **Automation is a Best-in-Class Aid:**
  - Learning Management System
  - Electronic Paperwork

- **Onboarding and Learning Integration Drives Growth:**
  - 26% of best-in-class organizations enroll new hires in learning and development programs

Hewitt and associates found companies who invested the most time and resources in onboarding enjoyed the highest levels of employee engagement.

1 (Aberdeen Group, 2013)
2 (All Aboard! Does Your Onboarding Process Lead to Employee Engagement or Buyer’s Remorse? 2006. David Lee.)
Onboarding includes:

- Company Mission and/or Vision
- Culture Assimilation
- Socialization
- Performance Standards and Expectations
- Resource Availability
- Skills needed to excel in job
In order to have a successful onboarding program, you must first have a solid grasp on your organizational culture.
According the Bureau of Labor statistics, two generations ago the average person held six jobs in their lifetime. What is that number today??
Question 2:

According the Bureau of Labor statistics, two generations ago the average person held six jobs in their lifetime. What is that number today??

11+
Question 3:

According to the Bureau of Labor statistics, what percentage of someone’s salary does it cost to replace them?
Question 3:

According to the Bureau of Labor statistics, what percentage of someone’s salary does it cost to replace them?

25%
## Benefits of a Strong Onboarding Program

<table>
<thead>
<tr>
<th>For Employees</th>
<th>For Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Learn about company culture and job-related resources</td>
<td>• Accelerate “Time to Perform”</td>
</tr>
<tr>
<td>• Start to build relationships and networks</td>
<td>• Improve employee retention</td>
</tr>
<tr>
<td>• Align expectations of job and career goals</td>
<td>• Improve customer satisfaction</td>
</tr>
<tr>
<td>• Feel engaged and valued</td>
<td>• Increase employee pride in company</td>
</tr>
<tr>
<td>• Become familiar and comfortable with job role</td>
<td>• Improve overall level of engagement</td>
</tr>
<tr>
<td></td>
<td>• Increase visibility of new hires</td>
</tr>
</tbody>
</table>
Why do onboarding programs fail?

- No one is directly responsible
- Viewed as a checklist or “orientation paperwork”
- Limited management interest or involvement
- Material introduced is never reinforced later
Onboarding Best Practices

• Accountability

• Consistency

• Automate what you can

• Don’t start day 1 with new hire paperwork

• Involve leadership and management in the program

• Expand over 1st year of employment
  • Three part process:
    • Initial Onboarding Program
    • 30-60-90 Day Plan
    • Development Plan
Onboarding: Part I
BOOT CAMP
<table>
<thead>
<tr>
<th>Time</th>
<th>Task</th>
<th>Time</th>
<th>Task</th>
<th>Time</th>
<th>Task</th>
<th>Time</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 AM</td>
<td>Welcome, paperwork, PC setup &amp; Expectations</td>
<td>8:30 AM</td>
<td>D1 Assessment</td>
<td>8:30a</td>
<td>D2 Assessment</td>
<td>8:30 AM</td>
<td>Day 3 Assessment</td>
</tr>
<tr>
<td>9:00 AM</td>
<td>HHS Vertical Presentation</td>
<td>9:00 AM</td>
<td>Mid-week Review</td>
<td>9:00 AM</td>
<td>Survival Skills Activity (Strategic Thinking/Healthy Conflict/Commitment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00 AM</td>
<td>Intro to Online Learning</td>
<td>10:00 AM</td>
<td>Relias Values Activity</td>
<td>10:45 AM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:30 AM</td>
<td>About Me Presentations</td>
<td>11:00 AM</td>
<td>Full Office Tour</td>
<td>11:30 AM</td>
<td>Insights Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:30 AM</td>
<td>Benefits/ADP</td>
<td>11:00 AM</td>
<td>Intro to Prof. Services</td>
<td>11:30 AM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00 PM</td>
<td>Welcome Lunch</td>
<td>12:00 PM</td>
<td>Lunch</td>
<td>12:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:30 PM</td>
<td>Lunch with Manager</td>
<td>12:30 PM</td>
<td>Lunch</td>
<td>12:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:00 PM</td>
<td>1:30 PM</td>
<td>1:00 PM</td>
<td>1:00 PM</td>
<td>1:00 PM</td>
<td>Engineering</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1:30 PM</td>
<td>Relias Overview</td>
<td>1:30 PM</td>
<td>Intro to Prof. Services</td>
<td>1:30 PM</td>
<td>Partnerships</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:00 PM</td>
<td>RLMs Intro</td>
<td>2:00 PM</td>
<td>Offsite Activity- Low Ropes Course</td>
<td>2:00 PM</td>
<td>Relias Connect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2:30 PM</td>
<td>Relias Culture w/ Jim T.</td>
<td>2:30 PM</td>
<td>Ropes Course</td>
<td>2:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:00 PM</td>
<td>Group Project</td>
<td>3:00 PM</td>
<td>Insights</td>
<td>3:00 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:30 PM</td>
<td>Introduction/Site Visit Review &amp; Expectations</td>
<td>3:30 PM</td>
<td></td>
<td>3:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:00 PM</td>
<td>Benefits/ADP</td>
<td>4:00 PM</td>
<td>4:00 PM</td>
<td>4:00 PM</td>
<td>Group Project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4:30 PM</td>
<td>Zoom Activity</td>
<td>4:30 PM</td>
<td></td>
<td>4:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:00 PM</td>
<td>Daily Wrap-up/Homework</td>
<td>5:00 PM</td>
<td>Daily Wrap-up/Homework</td>
<td>5:00 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:30 PM</td>
<td>Home Work</td>
<td>5:30 PM</td>
<td></td>
<td>5:30 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6:00 PM</td>
<td>Site Visit Prep/Final Project Work/LMS Course</td>
<td>6:00 PM</td>
<td></td>
<td>6:00 PM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

We transitioned to electronic paperwork mid-2017
Pre-Hire - Manager

• Send a Welcome Note
  • Include schedule and new hire paperwork

• Set-up workstation and systems access

• Notify current employees
The Relias Way

Onboarding: Part II

- 30 Day Plan
- 60 Day Plan
- 90 Day Plan
30-60-90 Day Plans

- Break into smaller chunks
- Instantly applicable
- Built in check-ins
- Manager accountability

“Research and conventional wisdom both suggest that employees get about 90 days to prove themselves in a new job. The faster new hires feel welcome and prepared for their jobs, the faster they will be able to successfully contribute to the firm’s mission.”

-SHRM
First 30 Days*

- Introduction to organization
- Connect with human and system resources
- Major responsibilities and expectations
- Corporate Onboarding Program
- Technology overview
- Review 30-60-90 Day Plan

Do not overwhelm them during this period. You want them to feel part of the team by the end of 30 days and have solid grasp on basic job functions.

*Frequent check-ins during this period are vital.*
30 Day Check-in

• Review all 0-30 Day plan items and agree on completion

• Engage 1:1, should be a formal check-in.
  – Ask things like:
    • Where are you excelling?
    • Where do you need more training?
    • Do you have any complaints or concerns?
    • What questions do you have?
31-60 Days

- Master skills from 0-30 day
- Client knowledge
- Tier 2 job functions that build on 0-30 day items
- Integrate with resources outside of department
- Role Clarity
60 Day Check-In

• Review all 31-60 Day plan items and agree on completion

• Engage 1:1, should be a formal check-in.
  – Ask things like:
    • Where are you excelling?
    • What development and training do you want or need?
    • Have you identified a potential mentor?
    • Do you have any complaints or concerns?
    • What questions do you have?
61-90 Days

- Master 31-60 day skills
- Tier 3 responsibilities, building on 31-60 days skills
- Role Clarity
- Comfort in Organization
- Assess areas development
90 Day Check-In

• Review all 61-90 Day plan items and agree on completion

• Engage 1:1, should be a formal check-in.
  – Ask things like:
    • Where are you enjoying the most?
    • What development and training do you want or need?
    • Do you have any complaints or concerns?
    • What questions do you have?

• Schedule follow-up: Development Plan (next 2 weeks)
# 30-60-90 Day Template

## New Hire 30/60/90 Day Plan

**Employee**

**Position**

**Manager**

### First 30 Days

<table>
<thead>
<tr>
<th>Item</th>
<th>Start Date</th>
<th>End Date</th>
<th>Resources Needed</th>
<th>Required Result</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**30 Day Check-In**

**Employee Signature**

**Manager Signature**

### 31 – 60 Days

<table>
<thead>
<tr>
<th>Item</th>
<th>Start Date</th>
<th>End Date</th>
<th>Resources Needed</th>
<th>Required Result</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**60 Day Check-In**

**Employee Signature**

**Manager Signature**

### 61 – 90 Days

<table>
<thead>
<tr>
<th>Item</th>
<th>Start Date</th>
<th>End Date</th>
<th>Resources Needed</th>
<th>Required Result</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**90 Day Check-In**

**Employee Signature**

**Manager Signature**

---

111 CORNING ROAD, SUITE 250, CARY, NORTH CAROLINA 27518
“Providing true early career support today stands as the single most important thing firms can do to energize new hires and gain their long-term loyalty and enthusiasm.”

~Mark A. Stein & Lillith Christiansen
Authors of Successful Onboarding
Onboarding: Ongoing Through First Year

- Individual Development Plan (IDP)
- Feedback, guidance, and recognition
- Provide the right tools
- Are they included as part of the team
- Provide employees a purpose
- Check-in

“You get the employee engagement you deserve. If you don’t engage with them, they won’t engage with you...This is particularly true at important moments of truth starting with how you onboard them.”
- George Bradt, Forbes
INDIVIDUAL DEVELOPMENT PLAN (IDP)

Development Plan Template

Employee Information

Name: 
Manager: 
Titles: 
Departments: 

Current Position Development

Review the key competencies, skills, abilities, and characteristics (KSAs) indicative of success in your current job, including any job-specific competencies, if applicable. From these KSAs and feedback from your manager during the initial IDP meeting, outline up to three strengths and development areas for your success in your current job.

Strengths
What work methods and behaviors support achievement of key results in your current position?


Developmental Areas
What changes in work methods and/or behaviors are needed to support key results in your current position?


Future Development

Areas of Interest
What specific roles or areas beyond your current job are of interest to you? (In order of interest)? These can take into frame of additional responsibilities, other roles in the organization, and/or other developmental opportunities in and outside of work.


Transferrables
What knowledge, skills, abilities, or characteristics (KSAs) do you possess that would help facilitate your transition into one of your areas of interest?


Developmental Areas

What skills would you need to refine, improve, or develop to be considered successful in an area of your interest?


Your Plan

Checking key developmental goals to ensure specific KSAs for your current job and/or one of interest that you identified above. Developmental actions are concrete activities that will help you develop competencies in your specific KSAs. Success Measures identify measurable objectives that signify your increased competence. Resources/Support indicate what is necessary for you to execute your development actions and activities.


Your Comments

Manager Comments


Signatures

Your Signature: 
Manager Signature: 
Date: 
Date:
Four Promises You Should Make To Every New Hire Through Your Onboarding Practices

1. You will work to develop them as people in alignment with company goals.

2. You will give them the resources they need to do their job effectively.

3. You will provide them with transparent and frequent communication.

4. You will hold them accountable for clearly defined high performance standards.
Thank you.